CHAPTER 7

CASE/CLIENT DATA SCREEN

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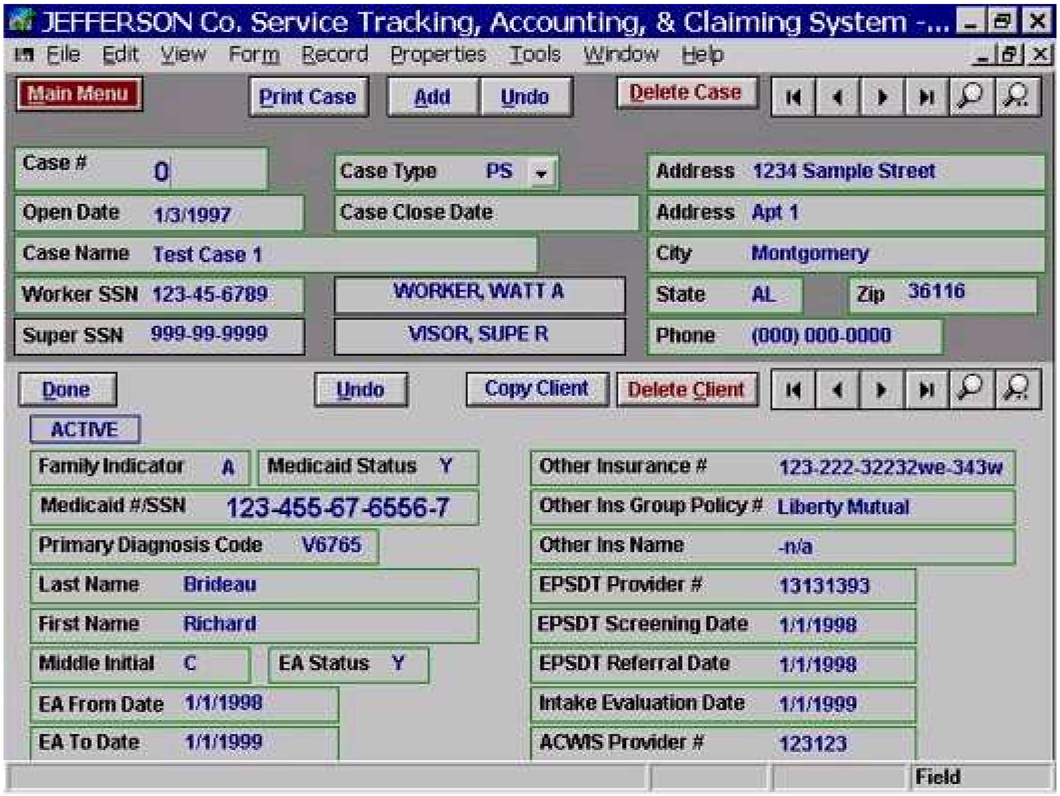
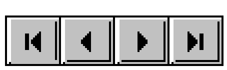


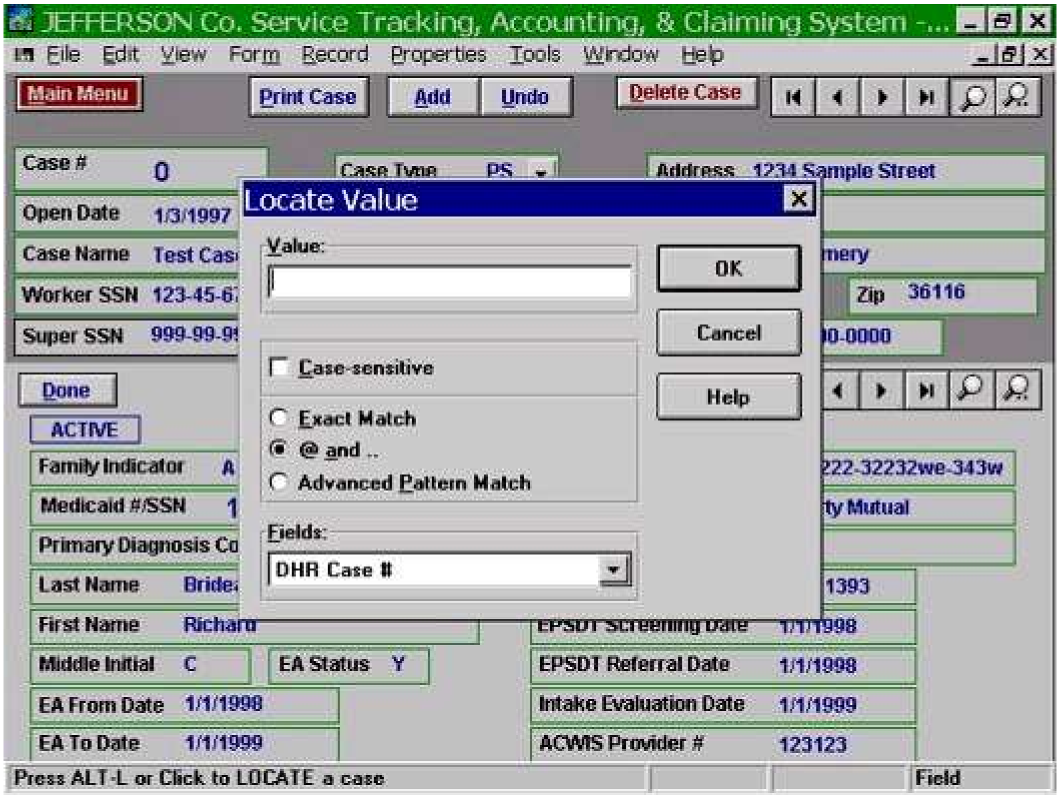
The Case/Client Data Entry screen is accessed by pressing Button **1** on the STAC Main Menu. When this screen is accessed, the first case to appear will be the case number having the smallest numerical value.

The Case/Client Data Entry screen is used for the following purposes:

- to add new cases or clients/children
- to close cases
- to edit information on previously registered cases or clients, especially Medicaid, EPSDT, or EA information

The upper half of the Case/Client Data Entry screen displays case data, while the lower half of the screen contains information on each client assigned to the case.

The VCR controls  located at the top of the screen may be used to scroll backward and forward through case records.



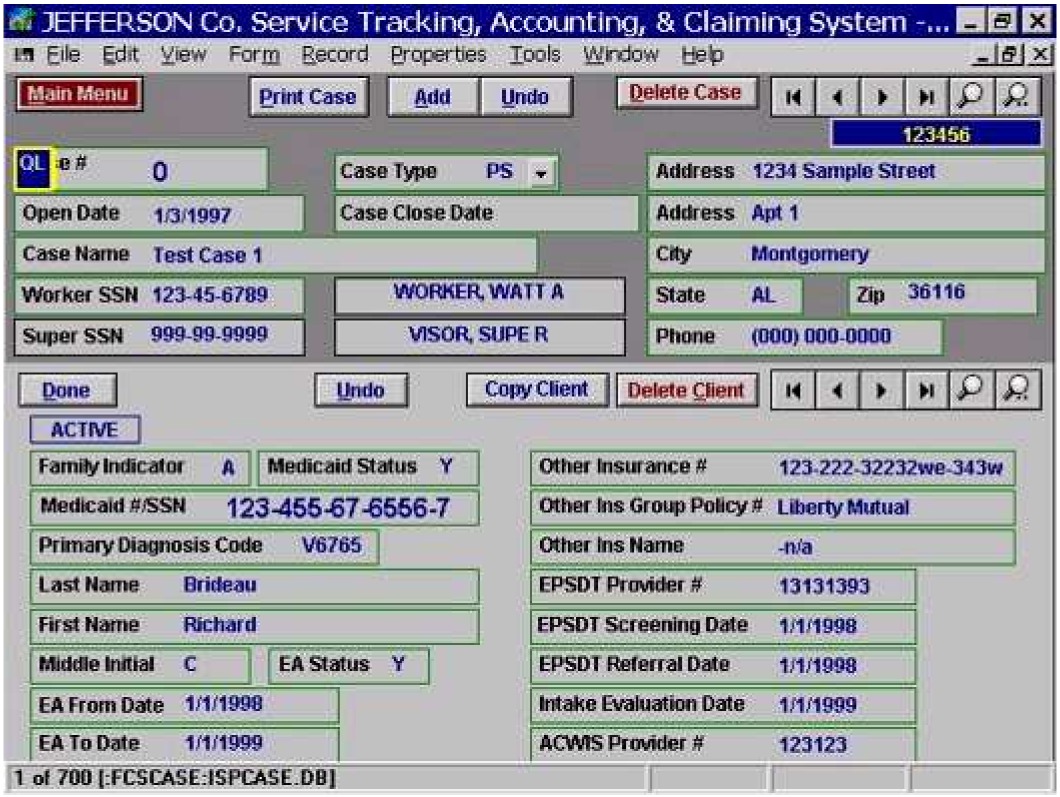
Click on the **Magnifying Glass**  button for Locate Value help. The screen resulting from a click on this button and instructions for its use are shown on this page.

The **Locate Next**  is used to continue searching for the same information (i.e. case number, case name, SSN, etc.)

The Locate Value dialog box is used to find particular field values, such as a case name, case number, or SSN. Use the Magnifying glass  in the appropriate field of the screen for Lookup help.

On the screen shown above, a search is being done to locate case #888889. Place the cursor in the field needed, for example, on this screen “Case #”. Click on the magnifying glass , and the Locate Value box will appear. Enter the case number in the Value box, and click on OK. The case/client data for case #888889 should appear.

<u>NOTE</u>: You can also use the Quick Lookup function F12, see page 13 for instructions.



This screen displays the result of the previous Locate Value search. If an incorrect case number (for example, 30) had been entered, and there was no data on that case, the message "30 was not found" would have appeared at the bottom of the screen in the status bar. To edit the record, press **F9** button and changes may be made to case or client information. Note the word "Edit" in the display line at the bottom of the screen. When all changes have been made, press **F9** again to take the case out of Edit mode.

Locate Value box

Below is a brief explanation of the matching choices in the Locate Value box:

Case Sensitive
This selection allows you to locate text which appears exactly as you type it. For example, if you capitalize all letters in a name in the Value box and your case/client data only capitalizes the first letter of the name, the data will not match.

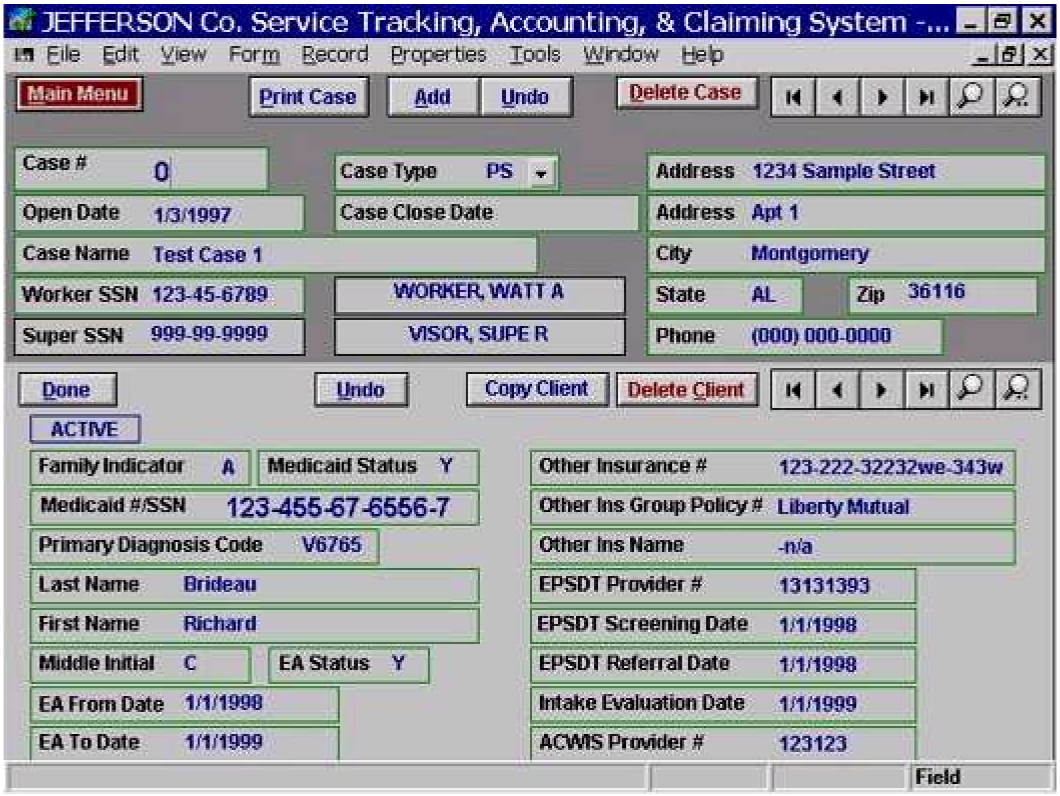
Exact Match
If you do not wish to match a pattern, choose this button. Paradox will locate only values that match exactly what was entered in the Value text box. This prevents pattern characters from being treated as wildcard characters.

@ and ..
This choice allows you to use either or both of these wildcard characters (see list below) in your locate search. **This is the preferred selection**. (@ represents any character, and **..** represents any number of characters.)

Advanced Pattern Match
Choose this button if you want to use Paradox's advanced wild card operators. The table below shows a list of the advanced wild card operators which can be used to match patterns.

Wild card	Operation
^	Beginning of field
$	End of field
*	Match none or more of the expression before the *
+	Match one or more of the expression before the +
?	Match one or more of the expression before the ?
|	Match either of the characters before or after the vertical bar
[]	Match any characters contained within the brackets
[^]	Match any characters not contained within the brackets
()	Group contained characters

ADDING A NEW CASE



To add a new case, be sure the cursor is in the top section of the screen and click on the **Add** button. A screen with blank fields appears and is ready for data entry of new case information. Basic case information will be added in the upper section of the screen. Information on each client/child in the case will be added in the lower section.

STEPS FOR COMPLETING UPPER SECTION

1. Type in the DHR Case #. Press **Tab** or **Enter.**

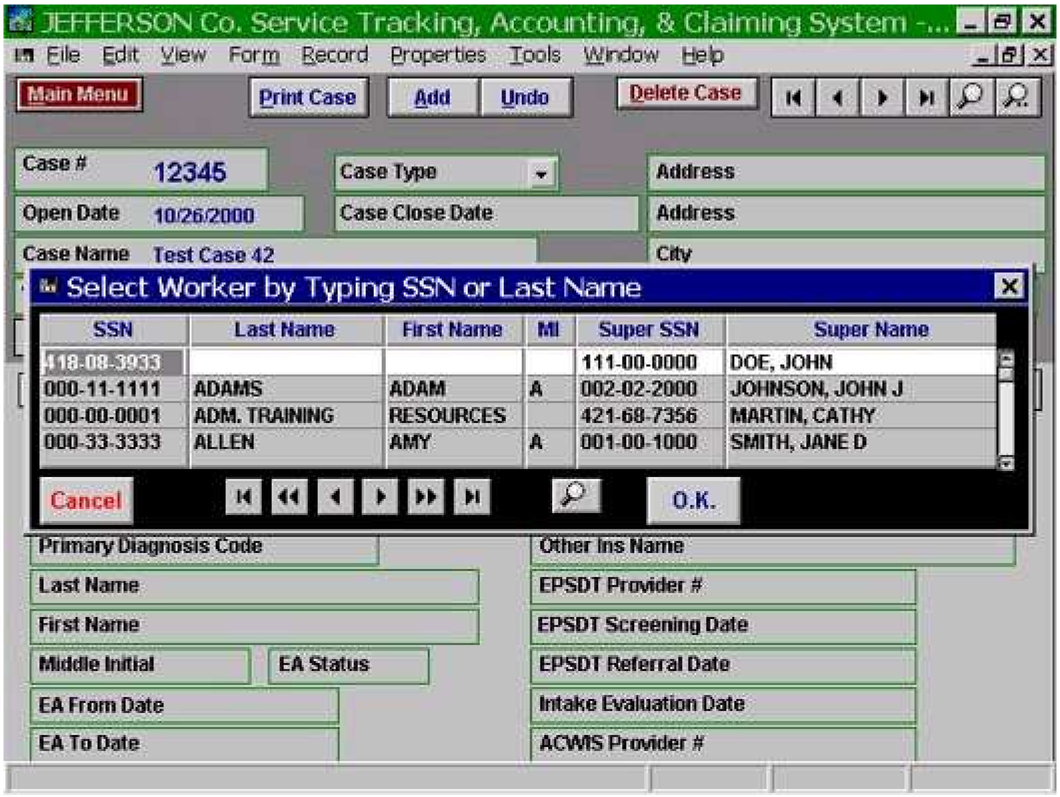
- <u>**NOTE**</u>**:** If the case number keyed in is already used in STAC, you will receive the message "Case # already exists". If a worker gets locked in the STAC system, a message may appear at the bottom left of your screen (for example, a "key violation"). If this happens, the application is asking for additional information, or you have entered incorrect information. Try clicking on the Undo button to back out your changes, then try to re-enter your data. However, if you should experience a lock-up problem, please <u>do</u> <u>not</u> turn off your PC or press **Ctrl/Alt/Delete**. This can damage table headers and create lock file problems. Instead, try holding down the **Control** key and pressing the **Break** key. Then re-enter Windows and STAC, and the program should run correctly. If you are still locked, please call Tech support at the CIS Help Desk (1-800-429-9508).
- After the error message is cleared, the case information for <u>that case number</u> will be displayed.

2. The current date will appear in the Open Date field. If the case was opened on a different date, you may type another date over this default date. Press **Tab** or **Enter.**

- **NOTE: All dates entered in fields in STAC should be entered in the MM/DD/YYYY format**

3. Type in the Case Name (the name of the Primary Adult). Press **Tab** or **Enter.**

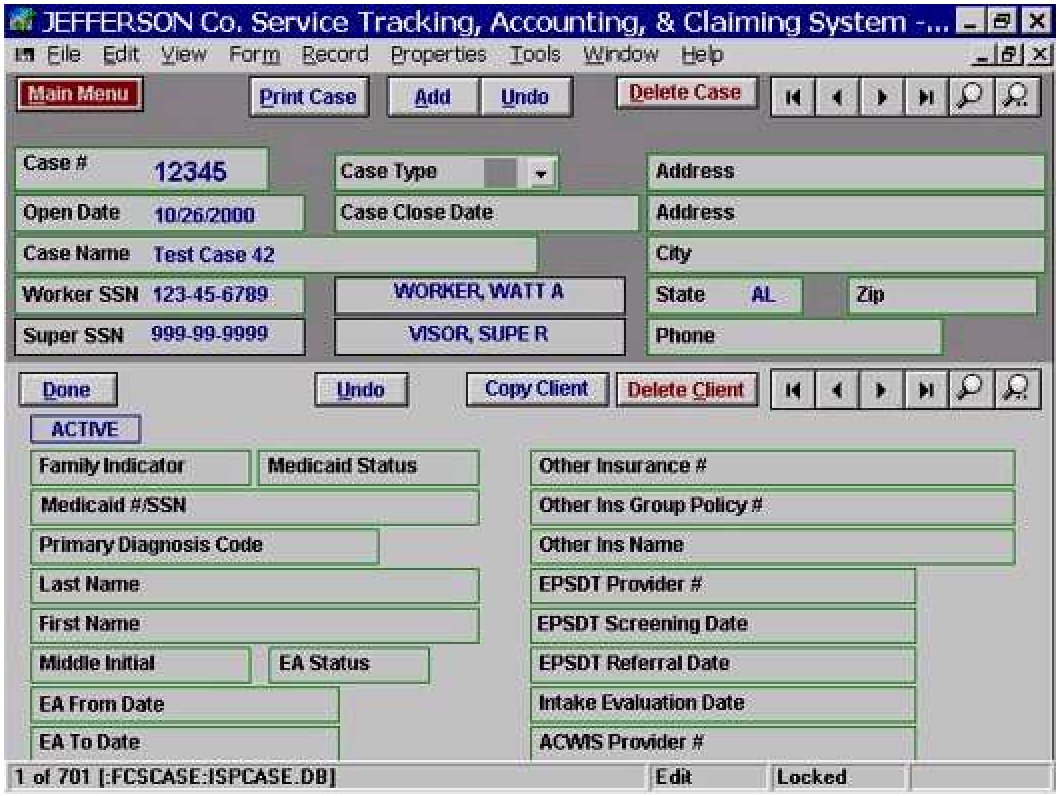
4. The cursor will move to the Worker SSN field. **Right click the mouse** for Worker and Supervisor Lookup Help.



Above is an example of the resulting worker Lookup Help box.

Use up and down arrow keys or the mouse to highlight the correct worker's name. Click **OK**.

The Worker's SSN and Name, as well as the Supervisor's SSN and Name, will automatically be inserted in the appropriate fields at this point.



5. Select the Case Type. Case types are as follows:

PS - Protective Service	CN - Children in Need of Supervision
FC - Foster Care	HE - Home Evaluation
FR - Family Request	O - Other
CO - Court-ordered Supervision	

Click on the down arrow in the Case Type window to access these Case Type abbreviations. Click on the desired type case. It will automatically display in the window. Press **Tab** or **Enter.**

6. The cursor will tab to the Case Close Date field. When the case closes, enter the date in this field. Press **Tab** or **Enter.**

NOTE: If a closed case is reopened, remember that the Case Close Date must be deleted.

7. The cursor will move automatically to the Address field. Complete the fields for the Address, City, State, Zip, and Phone as needed. To enter an Area Code, an open parenthesis " (" may be typed, or the spacebar may be pressed. The close parenthesis and hyphen in the phone number are added automatically. Press **Tab** or **Enter** after the phone number has been entered.

STEPS FOR COMPLETING THE LOWER SECTION

The cursor will move to the bottom section of the screen which is for the data entry of individual case clients. Each adult and child in the case must be entered individually in this bottom section of the screen.

1. In the Family Indicator field, type an A for adult or C for child.

2. Cursor will advance to Medicaid Status. This field should be completed with a "**Y**" for Yes or "**N**" for No. The default is a "**Y**", make sure to change it to "**N**" if the client does not have Medicaid.

- **NOTE: If a client's Medicaid status is N, there should be no check digit (the 13th digit) with the client SSN.**

3. The cursor now advances to the Medicaid #/SSN field. Type one zero (STAC will change to 3 leading zeros for both the Medicaid # and the SSN), the client's SSN, and the client's Medicaid check digit, if adult or child is Medicaid eligible. **(NOTE: Rather than typing in one zero, press the space bar once, and the three zeros will appear automatically.)** If the client is not Medicaid eligible, do not enter check digit. All Medicaid and Social Security Numbers must have the leading zeros.

- **NOTE: If a pseudo number is ever used for a client's social security number, be sure that particular number is never used again for another client. It has been suggested that one person in each county keep a pseudo list to ensure that the number is only used one time.**

4. The cursor will move to the Primary Diagnosis Code which will automatically default to V6290. Children receiving Mental Health services under the Medicaid Rehab option should be coded V6290 unless another diagnosis has been assigned by a qualified mental health professional. If another code needs to be assigned, type over the default code. Press **Tab** or **Enter.**

5. Type in the client's Last Name. Press **Tab** or **Enter.** Follow the same procedure for First Name and Middle Initial, if known. Cursor will move to EA Status field.

6. The EA Status window should be completed with one of the following letters: **Y** (yes), **N** (no), or **P** (pending).

7. The cursor now moves to the EA From Date field. If a Y was entered in the EA Status field, type in a beginning date of EA eligibility. Press **Tab** to access the EA To Date field, and the end date will compute twelve months (MM\DD\YYYY) automatically from the EA beginning date.

8. Press **Tab**, and continue to complete the remainder of the fields as needed.

<u>NOTE</u>: If the client has an EPSDT Screening, enter provider #, screening date and referral date here. The EPSDT # must be nine digits. If the number is not, just add leading zeros to make it nine digits.

9. Information will be posted after tabbing off the ACWIS Provider # field. At that time, the client data fields should be cleared, and client information will be posted to the data tables. The cursor will return to the Family Indicator field, and additional clients may be added as needed.

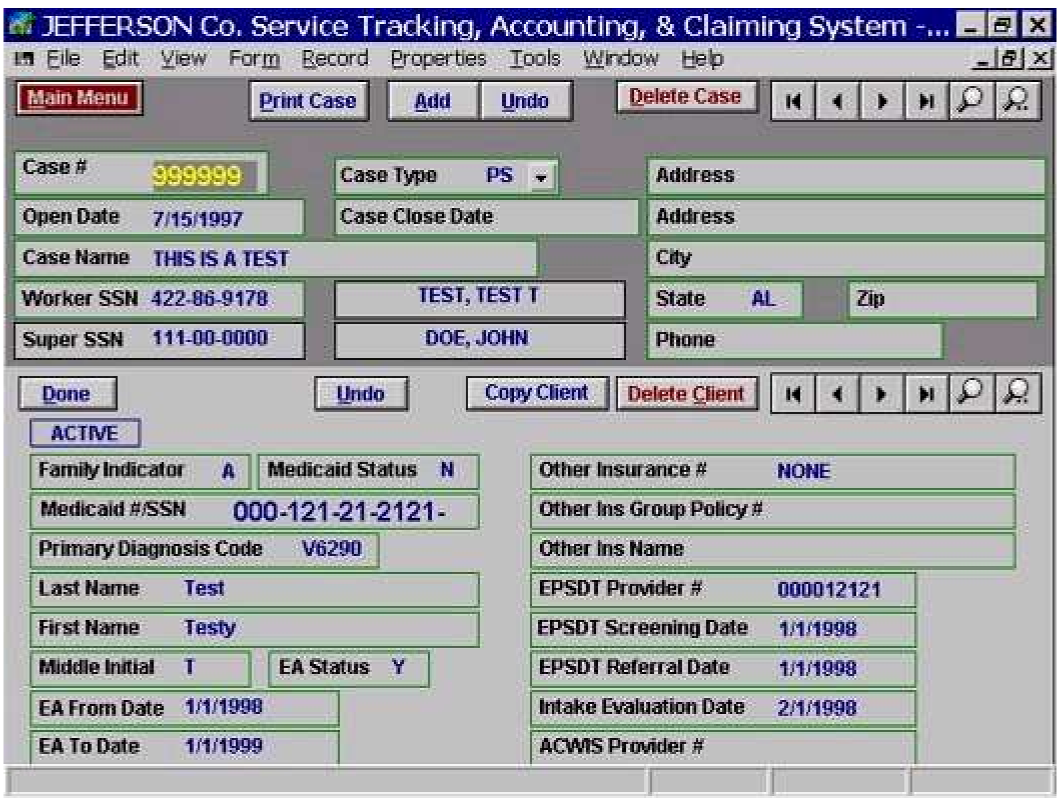
10. After all family members have been entered, click on the **DONE** button, this will take you out of Edit mode. To return to the STAC main menu, click on the Main Menu button.

EDITING OR UPDATING CASE/CLIENT DATA

Case/client data will need to be edited or updated occasionally to change a client's EA eligibility and EPSDT fields as well as to report address changes and the addition of, children to the home. To edit or update a field, click in the field that needs to be changed, and then press **F9** for Edit mode. **Tab** to any other fields which need to be changed and make necessary corrections. When finished, press **F9** or the **DONE** button to end the Edit mode and then the 

button to return to the STAC Main Menu.

<u>**NOTE**</u>: If a required field has not been completed, user will not be able to edit or to **End Edit** and return to the **STAC Main Menu**. A message box will be displayed in the center of the screen stating which field/or fields were not completed. Complete the required field/or fields before pressing **F9** to end Edit mode and return to the **STAC Main Menu**.



This screen displays the case/client data entered for one client in case 999999.

ADDING A CLIENT

There are two ways to add additional client/child to the same case. The first way is put the cursor in the Family Indicator field and click on **Add**. The Case information in the top section of the screen will remain, but the bottom section of the screen will display blank fields. The second way is to click in the Family Indicator field, press the **F9** key, to put the case in **Edit** mode, then press the **Insert** key on the keyboard. Follow the instructions on the preceding two pages to add another adult or child.

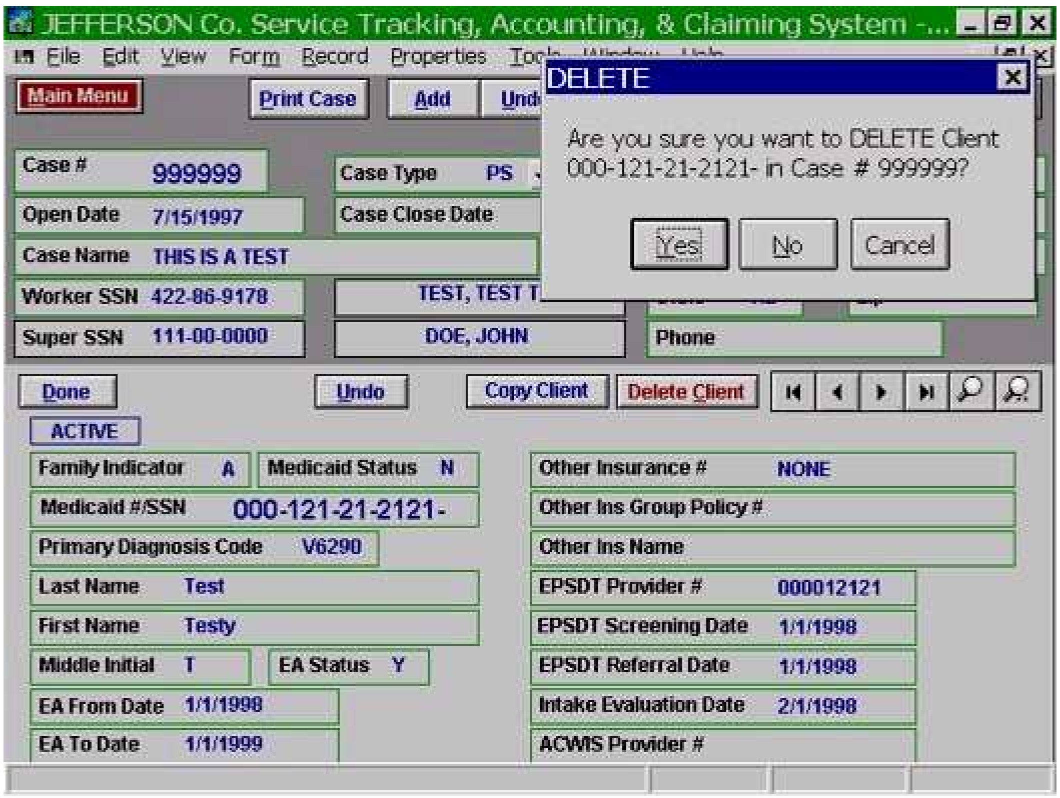
ADDING ANOTHER NEW CASE

To add another case, position the cursor in the Case # field, and click on **Add**. The entire screen will be reset to blank fields. Follow the directions beginning on page 35.

DELETING A CLIENT OR A CASE/CLIENT

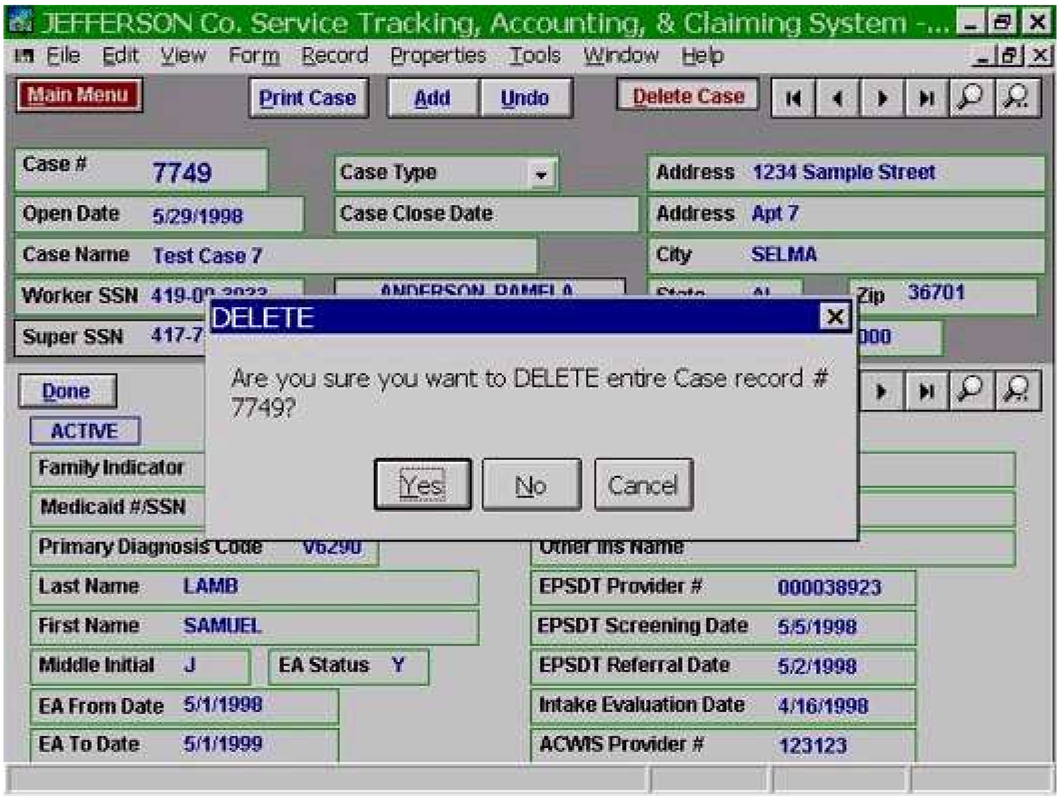
delete a client record

To delete a client record, position the cursor in the Family Indicator field, and press the **Delete Client** button.



delete the entire case record

To delete the entire case record, put the cursor anywhere in the top section of the screen and press the **Delete Case** button.



<u>NOTE</u>: Neither a client nor a case may be deleted if a purchase order exists for that client and/or case.

<u>NOTE</u>: If a client's SSN has been entered incorrectly and there has been a Service Authorization issued, the client must be re-entered in the same Case/Client file with the correct SSN. All future billing will be posted under this SSN.

<u>NOTE</u>: If a client's Medicaid status changes from N to Y, and the 13th digit needs to be added, you must re-enter the client on the Case/Client file using the correct Medicaid number.